

MINIMUM STANDARDS FOR GROUP AND PREPAID LEGAL SERVICE PLANS

The Board of Governors of the State Bar of Wisconsin September 21, 1973, approved the following standards to be met by all plans through which attorneys furnish group or prepaid legal services in Wisconsin:

1. The entire plan shall be reduced to writing and a description of its terms shall be distributed to the members or beneficiaries thereof;
2. The plan and description shall:
 - (a) State clearly and in detail the benefits to be provided, exclusions therefrom and conditions thereto;
 - (b) Describe the extent of the undertaking to provide benefits and reveal such facts as will indicate the ability of the plan to meet the undertaking;
 - (c) Provide that there shall be no infringement upon the independent exercise of the professional judgment of any lawyer furnishing service under the plan;
 - (d) Specify that a lawyer providing legal service under the plan shall not be required to act in derogation of his professional responsibilities; and
 - (e) Set forth procedures for the objective review and resolution of disputes arising under the plan;
3. There shall be a periodic written report not less often than annually disclosing to members or beneficiaries of the plan and to the State Bar of Wisconsin

a summary of the operations of the plan including, but not limited to, all relevant financial data, the number of members or beneficiaries receiving legal services, and the kinds of benefits provided;

4. Each plan should provide for an advisory group including members of the bar and beneficiaries of the plan which shall meet periodically to review and evaluate the organization and operation of the plan and to offer suggestions for its improvement.

